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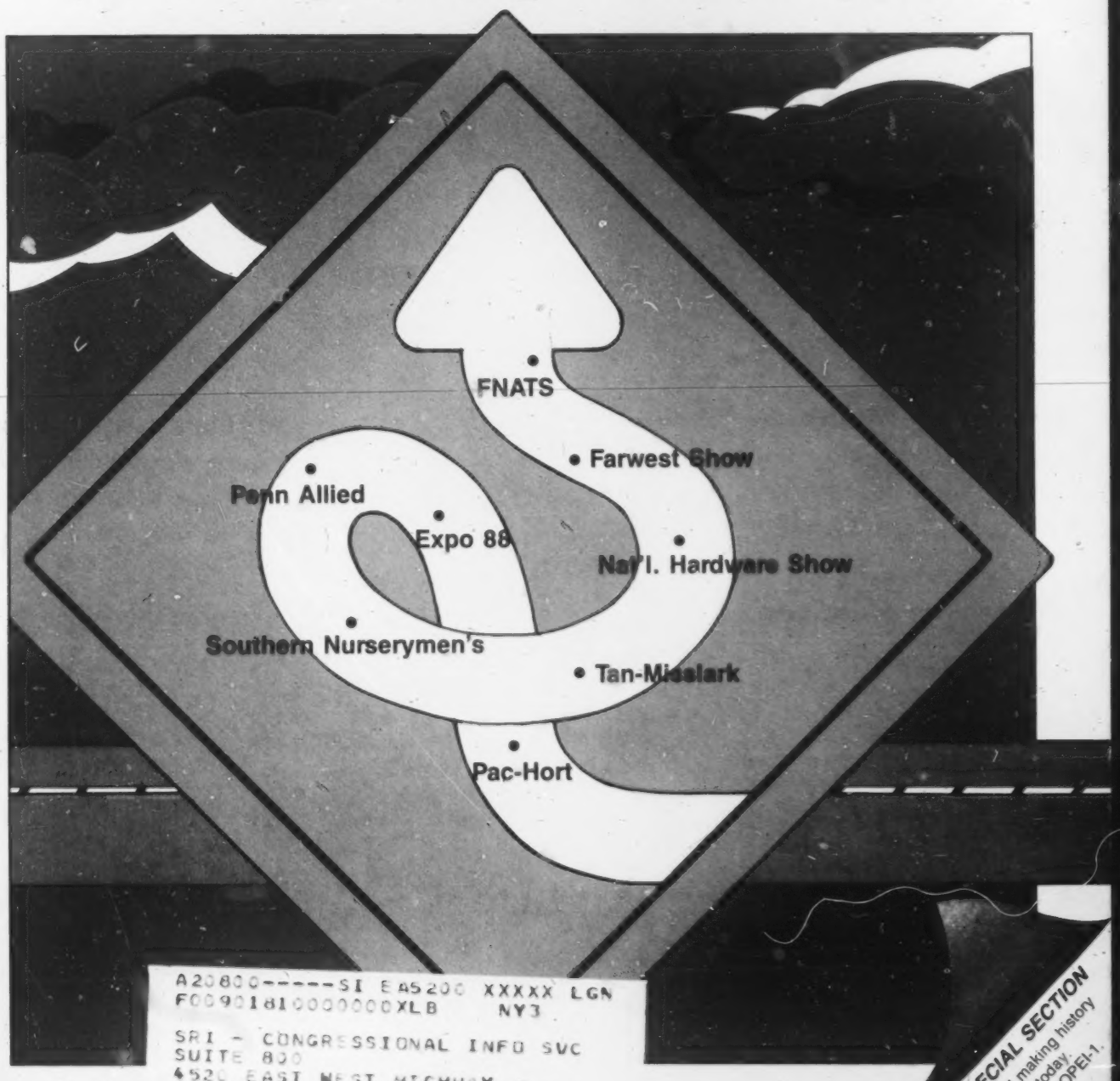
Lawn&Garden Marketing™

JUNE 1988

An Intertec publication

Cover story: Finding your way to the shows

Container gardening • Fertilizer update



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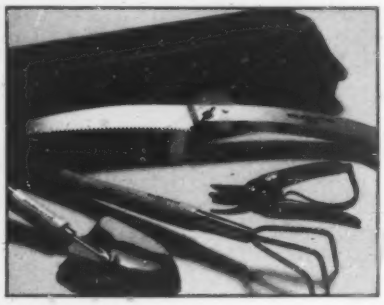
Lawn&Garden Marketing™

The merchandising magazine for lawn, garden and leisure living products.



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Did you know?

When consumers are looking for advice on gardening, 26 percent turn to friends and neighbors. But 25 percent look at the information on packages, another 25 percent look at seed packets, 22 percent go to the newspaper and 20 percent ask relatives.

Source: 1987-88 National Gardening Assn. annual survey by the Gallup Organization.

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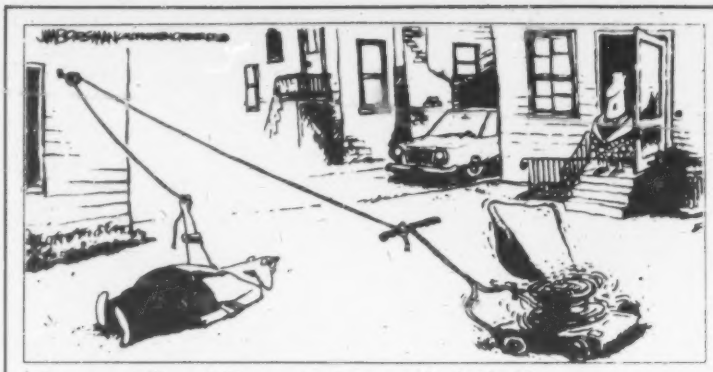
From the Editor



"Oh, come on, Howard. The new tax form *can't* be that bad."

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This editorial cartoon accompanied a syndicated column on what was then a fast-approaching tax deadline; the column ran on the Opinion page of the April 7 issue of my local evening paper. When I opened the page on which it appeared, I gasped.

My husband, who was sitting in the same room, looked concerned at my outburst. When I showed him the cartoon, I could tell by his expression that he clearly did not understand the seriousness of the depiction. I attempted to explain.

It is bad enough that such an incident involving a lawnmower be shown at all—I am certain that all OPE manufacturers and dealers across the nation are grumbling, "And that guy (in the cartoon) would probably still name me in his products liability suit." But to add further insult to injury, the cartoon was published in April, the month established by the Outdoor Power Equipment Institute as National OPE Safety Month! In short, the cartoon seemed to work against this industry's earnest efforts at promoting the safe use of power equipment products.

I don't doubt that many newspaper readers found it funny. In fact, I probably would have, too, under different circumstances. But I wanted to make a statement to somebody—I chose to make it to the artist.

His name is Jim Borgman, and I called him at his office at *The Cincinnati Enquirer;* I asked him simply, "What possessed you to use a lawnmower in the illustration? Why not show the man leaping from a window, jumping in front of a moving train or lunging from a cliff—obviously more cliche examples?" Borgman laughed. "Where were you when I was drawing it?" he said.

I explained to him who I was and why the cartoon was not likely to be found humorous to many in this industry: by those who had witnessed lawsuits against manufacturers of power equipment, by those who worked diligently with the Consumer Products Safety Commission to develop voluntary safety standards and safety testing procedures, by those who took power equipment seriously and, in fact, devoted millions of dollars and man-hours to protecting the safety of their end users—even those consumers actually stupid enough to pull a mower over themselves purposely!

I told Borgman that I wanted to understand what went into his thinking and to help him understand my feelings on the subject matter. "I could have used any of those examples you cited," Borgman explained. "I *could* have drawn a man jumping in front of a train. But I wanted to illustrate in a domestic environment the kind of frustration this kind of person would feel....Obviously, a moving train would not be nearby." Borgman said he believed that most people took it "in the spirit in which it was intended."

When I hung up, I knew I hadn't really accomplished anything; after all, he was just one person, one cartoonist. But I did feel better. And maybe, just maybe, next time he won't depict power equipment as a weapon.

Susan L. Anderson

Lawn&Garden Marketing

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Don't overlook the opportunities

Retailers who offer a variety of fertilizer products, and who take the time to understand and explain to consumers the differences between them, will profit.

By Adele I. Rogers, *editorial contributor*

Unlike pesticides, which often bring thoughts of work, fertilizers and related products connote the leisure side of gardening. And with 70 million households participating in lawn and garden activities in 1987, sales of fertilizer products have yet to reach their full potential. Because of the number and variety of products available, a tremendous opportunity awaits retailers who can cross-sell many of these products.

Traditionally, fertilizers have been made available in a multitude of formulas, in a variety of compositions and in an assortment of delivery systems; among these, the consumer picks the one he prefers. But today's market offers more than a selection of products that results in a single purchase; good merchandising can lead to combination purchases.

Sorting out the choices

Here are just a few of the innovative product concepts that have recently emerged, as well as some old standbys that have undergone facelifts:

- The 120-year-old O.M. Scott & Sons Co., Marysville, Ohio, is very much the DIY lawn care leader it always has been. Senior marketing manager, Ashton Ritchie, says, "The new independent and entrepreneurial atmosphere at Scotts has yielded to more creative and aggressive marketing. New packaging, modified formulas and new product concepts have kept Scotts in the forefront, and while we feel that slow-release type lawn fertilizers are more effective, we also recognize that segment of consumers who prefer the newer hose-end liquid-feed type."

  Easy Care Liquid Lawn and Aqua Link watering tools are among the several line expansion products included in the company's $20 million promotional campaign for '88, which includes TV and radio advertising and rebate offers.
- Committed to slow release granules is Vigoro Industries, Fairview Heights, Ill. According to vice president, marketing, Ron Rimmer, "It is the most effective, environmentally safe and efficient type of fertilizer for broad-scale use." After a successful West Coast market test, the company has introduced its new plastic bucket nationally. "Deep Green Plus packaging with its comfortable carrying handle is child proof and convenient to use," Rimmer says, "and we are backing the product with the largest ad campaign—mostly spot TV—in Vigoro's history."
- The slow-release philosophy at A. H. Hoffman, Landisville, Pa., is similar to that of Vigoro's; of its wide line of plant care products, a significant portion is organic. Marketing director Bill Dittman says, "The company maintains a position of marketing quality products that provide consumer satisfaction, selection, convenience and value, and that (philosophy) will contribute to the success of the entire industry."

But the consumer who demands optimum performance is not the only one at retailers' shelves; a large consumer base notes convenience as its priority. The introduction of hose-end liquids has helped unveil this new market segment, composed primarily of homeowners who have little time to cater to lawn, shrub or tree care.

Many manufacturers who were already in the water-soluble or indoor liquid plant food business have jumped into this new market, as have sprayer manufacturers, granular fertilizer producers and entirely new companies. Some of these companies and their products include:

- The No-Clog Feeder from Stern's Miracle Gro, Port Washington, N.Y., a re-usable hose-end device, designed for economical water-soluble powder. President John Kenlon says, "So successful has been this concept that we introduced a 10-lb. plastic bucket with carrying handle, containing eight individual reload packets for the No-Clogs." A $10 million ad budget will support the brand this spring.
- Giant Steps from Fertilizer Solutions, Lebanon, N.J., an odd-shaped clear-plastic tank with built-in measuring scale for even application;
- Greensweep—recently acquired from The Andersons, Maumee, Ohio, by Monsanto, St. Louis—the industry's hose-end pioneers, with a variety of low-priced formulations; and
- Agro-Chem, Franklin Park, Ill., with its line of liquid natural/organic fertilizers and lawn treatments, which offer the consumer both a convenient and environmentally sound solution.

New market emerges

The tremendous expansion in this market proves that new product development certainly has not been limited to large scale application needs. New items and packaging options for houseplant and garden care have emerged to target these convenience-oriented consumers.

One such product is from Hyponex, Atlanta. Peter Durbetaki, marketing manager, says, "The ultimate in plant feeding convenience is our new effervescent tablet." Individually foil-wrapped, the tablet takes about one minute to dis-

Percentage of households purchasing a fertilizer product in 1987:

Type of fertilizer	Households purchasing %	Millions
Dry/granular	28	19.6
Houseplant	25	17.5
Liquid or water soluble	19	13.3
Natural or organic/manure	16	11.2

Source: National Gardening Assn./Gallup Organization

solve in a jug of warm water. No measuring is required, nor mixing, nor handling of fertilizer. The 3-oz. packets—a concept originally introduced several years ago by W.R. Grace, Cambridge, Mass., with its Peters Professional plant food line—are designed to attract first-time users. A $5 million ad campaign is supporting Hyponex this spring.

Optiflora Inc., Nashville, Tenn., entered the U.S. market and offered consumer convenience from the outset. What looks like sugar packets found in restaurants, Optimara soluble plant food is packaged in premeasured doses. The user simply tears the packet open, pours it in water and waits for it to dissolve.

Similarly, Peters introduced such a packet decades ago as a trial-size sample. Peters consumer marketing manager, Martha Shadan, says, "We have since aggressively promoted the concept" of attaching the trial-size packets as freebies on plants being sold. "It not only sells green goods," she says, "but leads to the purchase of Peters plant foods."

Value and high performance have always been the Peters product-development priority, according to Jack Peters, consumer product manager. But the convenience market wasn't about to be ignored at Grace and thus the birth of Peters Liquid. "There are two types of gardeners, and we've got products for both," Shadan says.

Another in this convenience category is Sierra's Osmocote, a controlled-release prilled plant food that combines the best of all worlds:

- it's convenient (no mixing or measuring, with infrequent application);
- it's safe (it won't burn plants or leach into soil and has a biodegradable resin coating);
- it's economical (depending on the formula, it lasts from 3 to 12 months); and
- it's high-performing (nutrients are available as plants need them, resulting in optimum growth and health maintenance).

Jay Rossi, vice president, marketing, says, "A stepped up spot TV and print ad campaign will tout Osmocote's unique features and benefits, and once the product is tried the repeat is very, very high."

Product expansion and broader market positioning have been the direction of many manufacturers.

- Clarel Labs, Deerfield, Ill., of Jungle Juice and Granny's Bloomers fame, promotes going the extra step with a foliar-feeding leaf shine called Ultimate;
- Dexol Industries, Torrance, Calif., offers a hose-end plant food for winterizing;
- Plant Research Laboratories, Laguna Hills, Calif., offers Oxygen Plus, which not only feeds plants but aerates soil and reduces overwatering; and
- International Spike, Lexington, Ky., with its Jobe's line—the father of plant care convenience with its spikes—now offers a liquid concentrate in a squeeze-meter bottle.

Sideline products add up for add-on sales

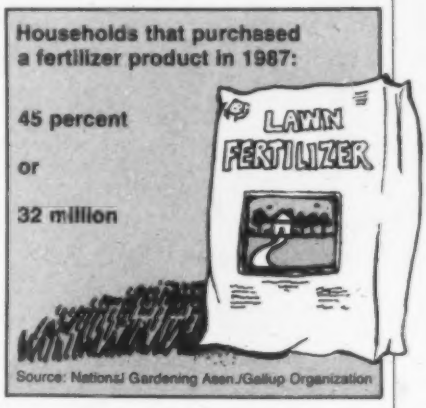
But there's more to plant care and to the packaged product category than fertilizers and pesticides. Several product categories that can complement the primary plant care product group include soil amendments, anti-transpirants, dethatchers and acidifiers. With more retailer and consumer education—and some creative merchandising—these products can present considerable money-making opportunities.

Thatch, the build-up of dead roots, decaying grass and sometimes chemical residues, is the major contributor to lawn disease and deterioration. Until recently, the only control was through mechanical means. But research has produced an easier, more effective way to eliminate the condition: from Phoenix, Ariz., Sudbury's D-Thatch and, from Minneapolis, Minn., Ringer's Restore. Each product performs about the same function, the former being a liquid self-mix, the latter a slow-release granular and both containing all natural, safe, non-toxic materials.

Consumers often assume that fertilization and pest control is what leads to a healthy lawn, but in the long term, these can actually contribute to an opposite effect. As Rob Ringer, director of sales development at Ringer Corp., puts it, "Chemicals take out of the soil, but don't put into it. A healthy lawn or garden begins with enriched soil, and that's what Restore will provide. With heavy thatch build-up, air, water and nutrients are not made available to the plant, and that's when problems surface. Ringer Restore products not only provide the necessary micro-organisms and enzymes to decompose thatch, but act as both a disease control and nutrient source."

Sudbury D-Thatch does what its name implies, and while the three key active components must be self-mixed, Sudbury's position is that liquid application is convenient. Ringer strongly believes in the slow release approach and concentrates on organic solutions with its broad range of products that serve the increasing demand for natural, safer remedies.

Another emerging category is plant protectants or anti-transpirants. Playing an important role in frost protection in agriculture and transplant shock reduction in horticulture, they have several home uses. Effective on trees and shrubs against freeze, on Christmas trees and wreaths against needle drop, on outdoor plants against summer stress, wind and drought and on all plants against transplant shock and dry-out, protectants have year round marketability.



The three players in the retail arena are Wilt-Pruf, Greenwich, Conn., ForEverGreen (formerly Envy) from Safer Inc., Wellesley, Mass., and Easy Gardener's CloudCover, Waco, Texas. Available in RTU and concentrate forms, each of the brands has upgraded graphics for maximum shelf appeal and will be subject to more aggressive promotion and positioning in the near future.

Proper in-store placement of these sideline products is important; the ability of sales clerks to realize cross-sell opportunities is equally important. Good retailers will not overlook the chance to capitalize on this, nor will they fail to recognize a customer who may be predisposed to diversity in fertilizer usage—a granular for the lawn, a liquid spray for the flower bed, spikes for the trees and premeasured plant food for houseplants. Creative merchandising, a thorough, knowledgeable sales staff at retail, coupled with some hefty promotional dollars and innovative products at the manufacturing level, are key to stepping up the pace further in this lawn and garden category. **—LGM**

Adele Rogers has spent the last nine years of her 20-year marketing, sales and general management career in the lawn and garden industry, beginning with W.R. Grace as marketing manager for Peters Plant Foods and Terra-lite soil amendments. She then joined Safer Inc. and eventually became vice president of U.S. operations. Rogers is currently operating a marketing and management services firm, which concentrates on assisting primarily lawn and garden companies to identify product and promotional opportunities, as well as providing hands-on project execution. For more information, you may contact her at (603) 382-5888.

Product Movement Report

Fall/Winter 1987

Nationally, sales in 11 of 22 fall and winter product categories increased, according to retailers responding to this *Lawn & Garden Marketing* survey. Retailers in three categories—garden centers, hardware/home centers and power equipment dealers—were asked to compare sales in the two seasons of fall and winter in 1987 vs. 1986.

Electric and gas chainsaws, electric and gas shredders/grinders and electric snowthrowers contributed to the fall sales decreases, according to respondents. Electric snowthrowers also contributed to winter sales decreases.

Those categories in which most retailers who responded indicated flat sales were electric and wheeled blowers/vacuums in the fall and gas snowthrowers and tractors in the winter.

Regionally Northeasterners, and categorically garden centers, rated fall and winter sales seasons most highly. In fact, 17 percent of the Northeasterners and 15 percent of the garden centers who responded rated the fall sales season as excellent; 16 percent of the Northeasterners and 16 percent of the garden centers who responded rated the winter sales season as excellent.

Nationwide, 10 percent of all retailers who responded said the fall sales season was excellent, 37 percent said good, 27 percent said average, 24 percent said below average and 2 percent said poor.

The winter selling season was rated excellent by 13 percent nationally of those responding, good by 27 percent, average by 24 percent, below average by 24 percent and poor by 9 percent.

Product categories that seemed to do exceptionally well all over the United States in the fall, according to respondents, were grass seed, lawn fertilizer, garden tools, gas blowers/vacuums, lawn tractors and gas snowthrowers.

Sales of garden tools in the fall were shown to be up by 40 percent of the hardware/home center respondents, who boosted national totals in this product category. (In all of 1987, 26 million—37 percent—of all U.S. households purchased hand garden tools, according to the 1987-88 National Gardening Survey, conducted by the Gallup organization and sponsored by the National Gardening Assn.)

As reported in the April/May issue

continued...

West

Products	% Up	% Same	% Down
Fall sales in '88 vs. '87:			
Bulbs	14	14	10
Grass seed	15	31	10
Lawn fertilizers	25	25	10
Garden tools	17	35	15
Blowers/vacuums:			
Gas	14	12	8
Electric	23	27	8
Wheeled	8	8	6
Chainsaws:			
Electric	6	14	15
Gas	12	21	19
Shredders/grinders:			
Electric	4	12	2
Gas	10	8	8
Lawn tractors	10	16	12
Snowthrowers:			
Electric	2	4	14
Gas	14	6	17
Winter sales in '87-'88 vs. '86-'87:			
Indoor plant supplies	14	19	6
Birdfeeders	25	15	6
Trim-a-tree	16	12	4
Melting compounds	12	6	14
Snow shovels	12	2	17
Snowthrowers:			
Electric	2	6	12
Gas	14	4	15
Lawn tractors	4	17	12

Based on % of those carrying the product line, indicating sales movement.

Source: *LGM* fall/winter 1987-88 survey.

North Central

Products	% Up	% Same	% Down
Fall sales in '88 vs. '87:			
Bulbs	8	10	3
Grass seed	14	24	4
Lawn fertilizers	12	22	12
Garden tools	8	24	12
Blowers/vacuums:			
Gas	14	26	11
Electric	8	11	16
Wheeled	1	9	5
Chainsaws:			
Electric	4	8	9
Gas	11	19	23
Shredders/grinders:			
Electric	5	3	4
Gas	5	3	4
Lawn tractors	26	16	18
Snowthrowers:			
Electric	3	7	15
Gas	19	19	31
Winter sales in '87-'88 vs. '86-'87:			
Indoor plant supplies	4	11	3
Birdfeeders	11	22	4
Trim-a-tree	14	12	3
Melting compounds	15	12	5
Snow shovels	14	16	10
Snowthrowers:			
Electric	3	5	12
Gas	20	15	31
Lawn tractors	20	12	18

Based on % of those carrying the product line, indicating sales movement.

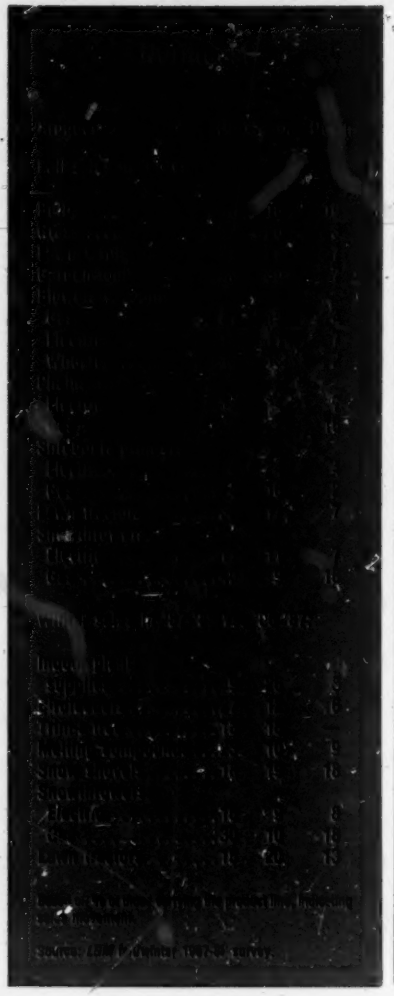
Source: *LGM* fall/winter 1987-88 survey.

South

Products	% Up	% Same	% Down
Fall sales in '88 vs. '87:			
Bulbs	11	5	5
Grass seed	16	13	3
Lawn fertilizers	20	7	13
Garden tools	14	27	9
Blowers/vacuums:			
Gas	23	30	11
Electric	11	14	13
Wheeled	7	2	11
Chainsaws:			
Electric	2	13	13
Gas	23	9	38
Shredders/grinders:			
Electric	—	4	5
Gas	2	5	14
Lawn tractors	16	21	23
Snowthrowers:			
Electric	—	—	4
Gas	2	—	4
Winter sales in '87-'88 vs. '86-'87:			
Indoor plant supplies	4	11	4
Birdfeeders	9	20	4
Trim-a-tree	5	9	4
Melting compounds	9	7	—
Snow shovels	11	5	4
Snowthrowers:			
Electric	—	—	4
Gas	2	—	5
Lawn tractors	9	21	16

Based on % of dealers carrying the product line, including sales increases.

Source: *LGM* fall/winter 1987-88 survey.



Product Movement...*continued*

of *LGM*, manufacturers' incentives/promotions and mother nature contributed to preseason gas snowthrower sales, particularly in the Northeast. It was in that region of the country where 40 percent of the respondents said sales of gasoline-powered snowthrowers were up vs. last year; 29 percent of all responding power equipment dealerships said the same.

Respondents noted that product categories that seemed to do exceptionally well across the nation in the winter were birdfeeders, trim-a-tree and bagged melting compounds, which obviously contributed to the positive responses shown by garden centers.

Winter sales of gas snowthrowers and lawn tractors were flat in '88 vs. '87, respondents reported. Slightly more responding retailers indicated sales decreases of electric snowthrowers compared to last year.

Respondents' sales increases of grass seed and lawn fertilizer in the fall may partly be credited to the efforts of such groups as the Nursery Marketing Council and the Planting Council (now joined as the Garden Council), which, through national advertising and celebrity spokesperson Willard Scott, encourage consumers to take part in year-round planting activities.

Positive sales in the fall bulb category are further reflected in the '87-'88 National Gardening Survey. The survey reported that $456 million was spent on all bulbs in 1987, a 6 percent increase in retail sales over 1986.

Retailers were asked for their ending inventory in four product categories. A median of nine chainsaws, seven snowthrowers, six lawn tractors and three blowers/vacs were held over. Nationwide, 11 percent of power equipment respondents said they were holding over 25 or more gas chainsaws. Only 10 percent were holding less than five. **—LGM**

The fall/winter 1987-88 survey results were based on 227 responses from three categories of retailers: garden centers, hardware/home centers and power equipment dealers. Retailers were asked to compare sales of product categories in fall/winter 1986-87 to fall/winter 1987-88. Surveys were mailed on an nth name basis.

Retail Marketplace

Monsanto acquires Greensweep from The Andersons

In April, Monsanto, St. Louis, makers of Roundup, acquired the Greensweep product line from The Andersons, Maumee, Ohio. An acquisition in this product category—rather than a new formulation—was seen by Monsanto as more desirable, according to Arnold Donald, business director of the lawn and garden division for Monsanto. He said, "We felt it was more prudent to acquire than to become yet another player in the liquid hose-end category—trying to build an established brand name and actually, at the same time, trying to displace today's category leader, which is Greensweep."

The popular product line has produced annual sales valued at approximately $50 million at retail. The exact purchase price of the line, though not disclosed, was in excess of $5 million.

Monsanto will roll the product line into its lawn and garden division at the end of the season, and the Greensweep name will be retained because of its recognition at the consumer level. Furthermore, Monsanto will likely expand the Greensweep line. Donald explained, "Over time we have every expectation that the line will include new chemistry that is developing... available probably in 1990."

The Andersons, which has six retail operations and currently is one of the largest private labelers of granular products, sees the sale of the Greensweep line as "a springboard into other opportunities," said Rich Raleigh, formerly marketing manager of the lawn division at The Andersons. According to Raleigh, the company has other products on the drawing-board ready for consumer entry and has plans to expand its retail store base.

Raleigh is now working for Monsanto, initially heading up its acquisition team during the transition. When asked if The Andersons' General Stores will continue to carry Greensweep, Raleigh answered, "You bet!"

Editor's note:
Beginning this month, Retail Marketplace replaces Green Scene. It will cover many of the same topics previously covered by Green Scene but will better target your needs for information on packaged products, hardlines, greengoods and companies producing these lines. Market statistics relevant to making your retail business more successful will be included as well.

Briefs

- A survey by the Gallup Organization says that the rose is America's most popular flower. Twenty-three million households grow roses—nearly 26.9 percent of the total number of households. Americans spent almost $400 million in 1987 to grow roses.

- **Ortho Consumer Products,** a division of Chevron Chemical Co., San Ramon, Calif., was given a special award from the National 4-H Council in recognition of three decades' support of 4-H programs. Also, Chevron has purchased the agricultural chemical products of Pittsburgh-based **PPG Industries Inc.**

- **The Toro Co.,** Riverside, Calif., has launched a national advertising campaign to promote products and encourage practices that conserve irrigation water. Titled "One Small Planet. One Big Challenge," the ads will appear in trade publications and be followed by intensive mailings.

- Steve Fesperman has been appointed vice president of **Koos Inc.,** Kenosha, Wis.; he will oversee operations at Shore Fertilizer Inc., Plant City, Fla.

Arett Sales founder dies at 87

Charles Librett, joint founder of **Arett Sales Corp.**, Cherry Hill, N.J., died March 10 in New Rochelle, N.Y. He was 87. Librett founded Arett Sales in 1951 in partnership with Eric Mueller and David Boylan.

Arett Sales has grown to be one of the leading lawn and garden distributorships in the country with 180,000 sq. ft. of warehouse space and 40 salespeople. The company will continue, run by his son, Irv Librett, who joined the company in 1962.

Garden Council established

The Nursery Marketing Council and The Planting Council have united to form one organization to promote the industry as the Garden Council. The board of directors consists of retailers, growers, landscape contractors/installers, association reps, industry and consumer manufacturers, distributors and communicators and educators.

The group plans to "Grow the Market" and focus its attention in 1989 on National Garden Week and the Fall is for Planting campaign.

Landscaping up in '87

The National Landscape Assn.'s 13th annual Economic Survey reports that the industry saw an increase in business of 20.5 percent in 1987, greater than the 16.5 percent increase predicted at the beginning of 1987.

In 1988, respondents said they are looking for the greatest increase in the category of new residential landscaping. They anticipate somewhat smaller increases for new commercial landscaping and residential renovation and a minor increase for commercial renovation.

1987 Change in Landscape Business*

	New Residential			Residential Renovation		
	up	same	down	up	same	down
Northeast	87%	13%	00%	73%	27%	00%
Southeast	65%	29%	6%	49%	43%	8%
Great Lakes	81%	18%	1%	65%	32%	3%
Great Plains	52%	31%	17%	68%	30%	2%
Other	50%	36%	14%	46%	39%	15%
Average	73%	22%	5%	63%	33%	4%

Source: National Landscape Assn. December 1987 Economic Survey

*Percent reporting changes from 1986